

Pre-Appointment Planning Worksheet



Your sales are derived from three sources: Skills, attitude and product knowledge. To help you truly benefit from your experience, use this *Pre-Appointment Planning Worksheet*. It has been designed to help you plan for the call, make the most of your meeting and create profitable relationships that last a lifetime. Remember, there are many sales within the sale and at each step, you must identify what is your objective for the sales activity. Here is a reminder of each step in the sales process and what the prospect, customer, or member should be thinking or saying at the end of each step.

Step 1: Attention = I like you

Step 2: Interest (Gather information while being interesting) = Tell me more

Step 3: Presentation = Answer the 4 Questions:

1. What is it?
2. How will it benefit me?
3. How much does it cost?
4. Can you prove it?

Step 4: Create Desire = How can I get it?

Step 5: Close = Where do I sign? What's next?

Objections should be anticipated from the start and addressed at the right time. Therefore, we do not list them as a separate step of the sale.

Prospect/Customer/member name: _____

Date, time and place of interview: _____

Objective for the encounter: _____

DiSC Style: _____ (see Interaction guide or customer map)

Are they the primary decision maker or does anyone else need to be involved?

What might be their potential objections and how might I address these?

Objection:

Response:

Objection:

Response:

Pre Call Planning Worksheet: *Consider DiSC style as you plan*

Step 1: Attention: (Rapport, Conversation).

What will be my opening statement to build rapport? Is there anything I should bring along, even an article of interest? What happened personally since the last meeting in their life that I might acknowledge?

Step 2: Interests while being interesting

What might be their buying motives, and where do their problems, pain or opportunity costs lie?

Create: One Reciprocity question and 3 Hypothetical questions based on pain, etc....

Transition with the statement, "The reason I asked is...."

Create the 30 second Message to open up their mind to your idea, product or service based on the pleasure or remedy you bring.

The reason I asked is we have an / a (idea, product, service, program) that

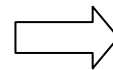
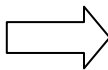
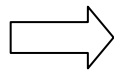
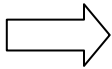
Step 3: Presentation Step:

State the fact

State the benefit

State the Buyers benefit

Prove it!



That's because Which means to you The real benefit to you is How will you prove?

Trial Close: Using Reciprocity: _____

Step 4: Create a 30 Second summary of what happens if they implement the decision

Step 5: What is the best way to ask for the decision? (Refer to 8 ways to ask)
